



TOPIC 4 | UNDERSTANDING MY INVESTMENTS

CHECK MY PROGRESS

Completed	Description	Reference
<input type="checkbox"/>	I have a basic understanding of investing; if not, I should consider hiring a financial advisor	Pg. 76-80
<input type="checkbox"/>	My allocations are appropriate for my risk tolerance and my investment goals	Pg. 76, 80
<input type="checkbox"/>	I understand my investments, especially my retirement investments	Pg. 81
<input type="checkbox"/>	I have rolled over my spouse's employer's retirement account (401(k), 403(b)) and any other IRAs to my IRA(s)	Pg. 81-82
<input type="checkbox"/>	I understand whether or not I have to take an RMD this year	Pg. 83-84
<input type="checkbox"/>	I understand how to update ownership to my jointly owned securities accounts	Pg. 85-86
<input type="checkbox"/>	I have considered the possible options for protecting my individual brokerage account to avoid probate	Pg. 86

BEFORE YOUR NEXT SESSION

1. Review the next session—Get Stabilized.
2. Complete as many of the activities as possible.